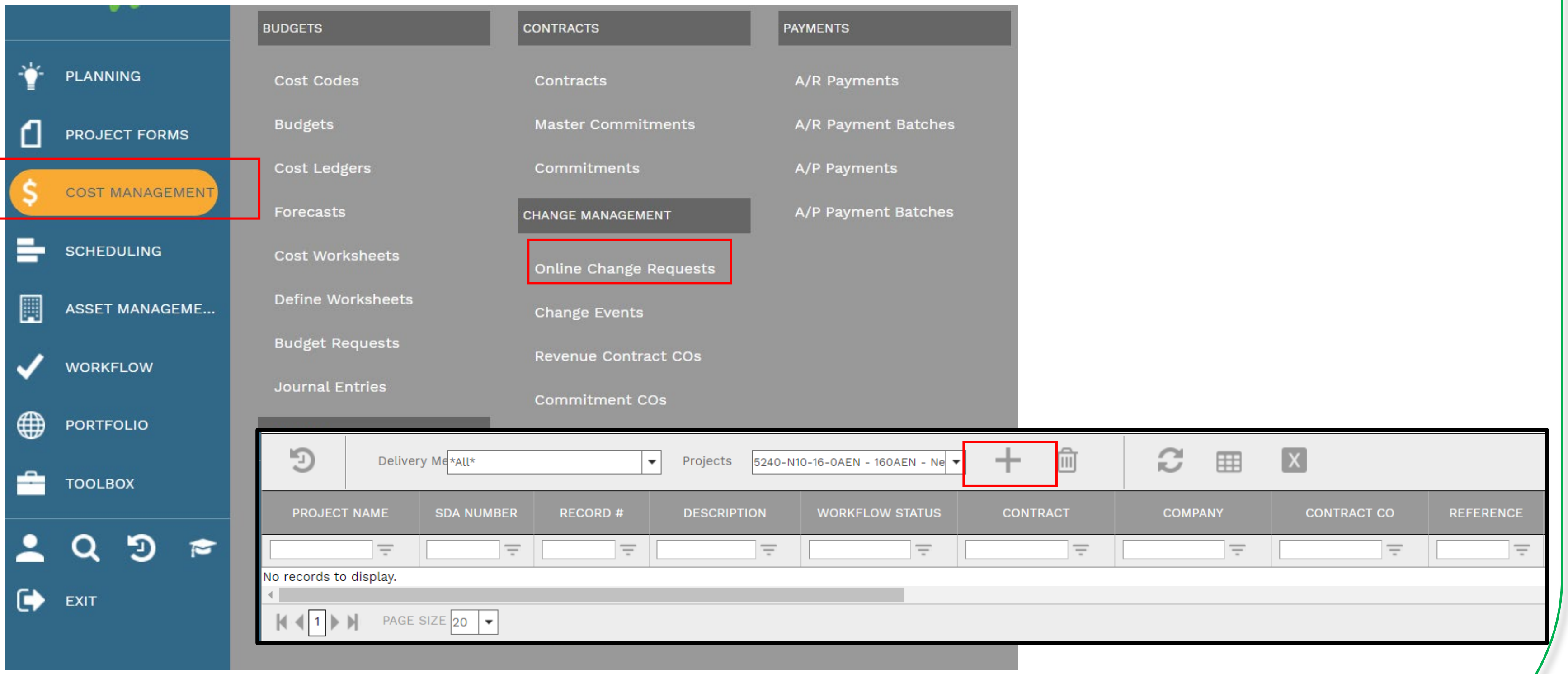
OPEN THE MODULE

- Choose **Cost Management -> Online Change Requests**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document, then double-click to open the document.
- To create a new document, click **Add**.

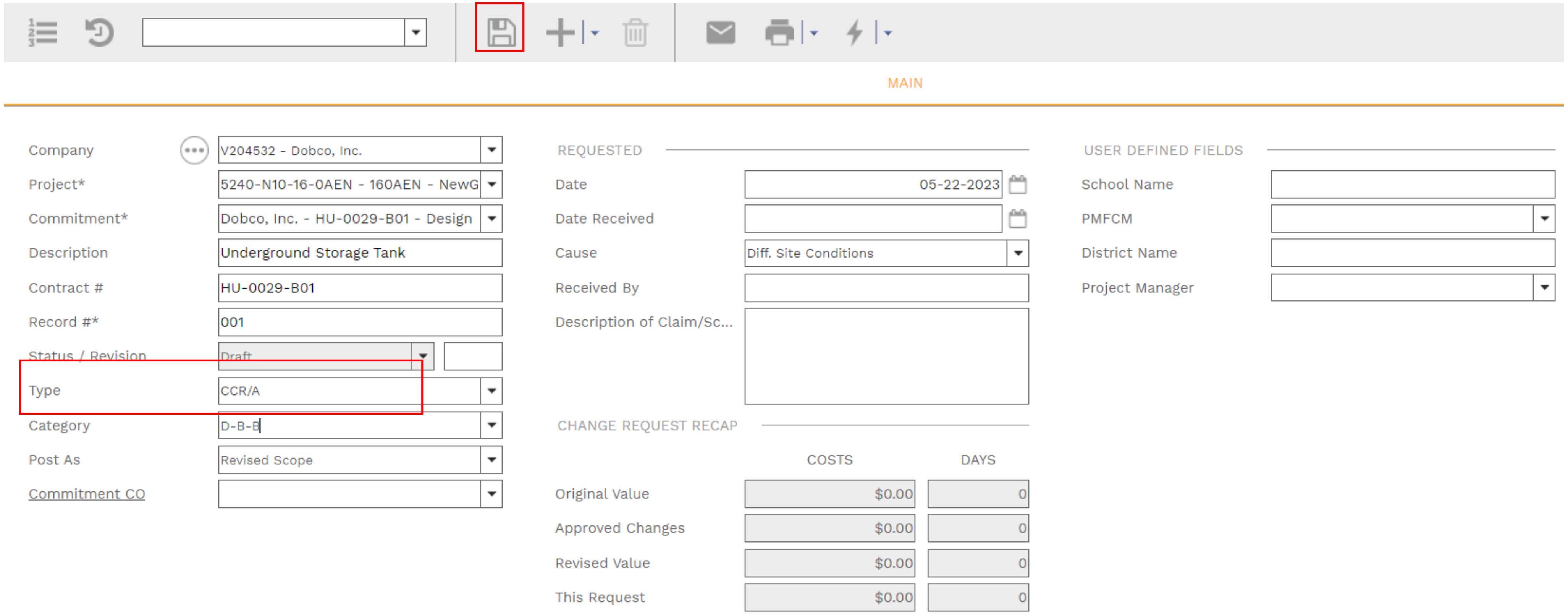


The phases of Change Management will be captured in PMWeb in two modules: **Online Change Request (OCR)** and **Commitment CO**. Phases to be captured in the modules include:

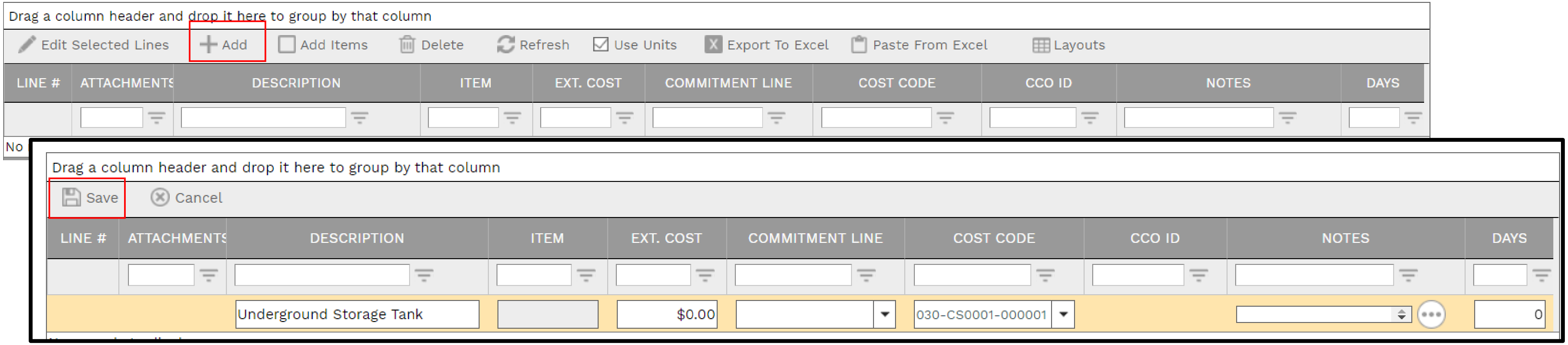
- Contract Change Request/Authority (CCR/A) – SDA Form 500
- Contractor’s Proposal
- Authority Agent Recommendation (AAR) – SDA Form 501
- Change Order – SDA Form 503
- Construction Change Directive (CCD)
- Contractor Claim Notice

ADD INFORMATION

- Complete all relevant information about the change in the Header section (top portion of the screen). Any field with an asterisk is a required field.
- Be sure to select the correct document type in the **Type** field.
- Click the **Save** button when finished.

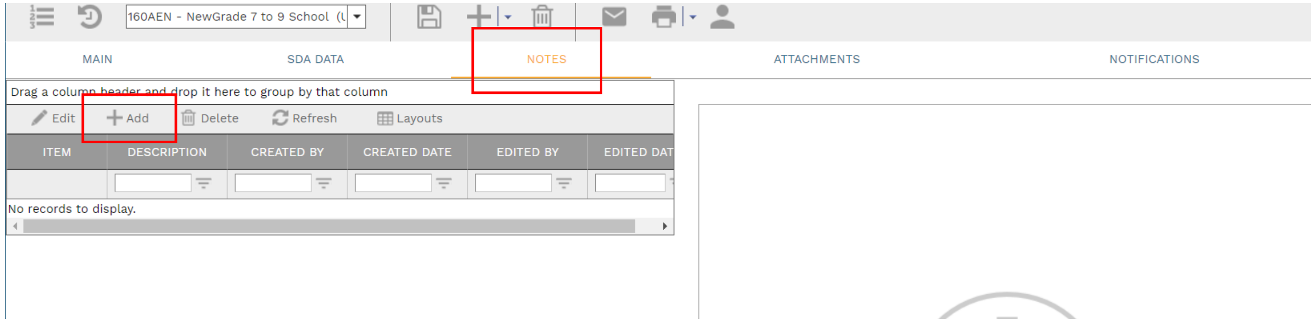


Click **Add** to enter the preliminary information in the bottom of the screen. Enter the information on the peach-colored line that displays. Enter the Description, Ext Cost (when applicable), Cost Code and any Notes required. Click the **Save** button when done.



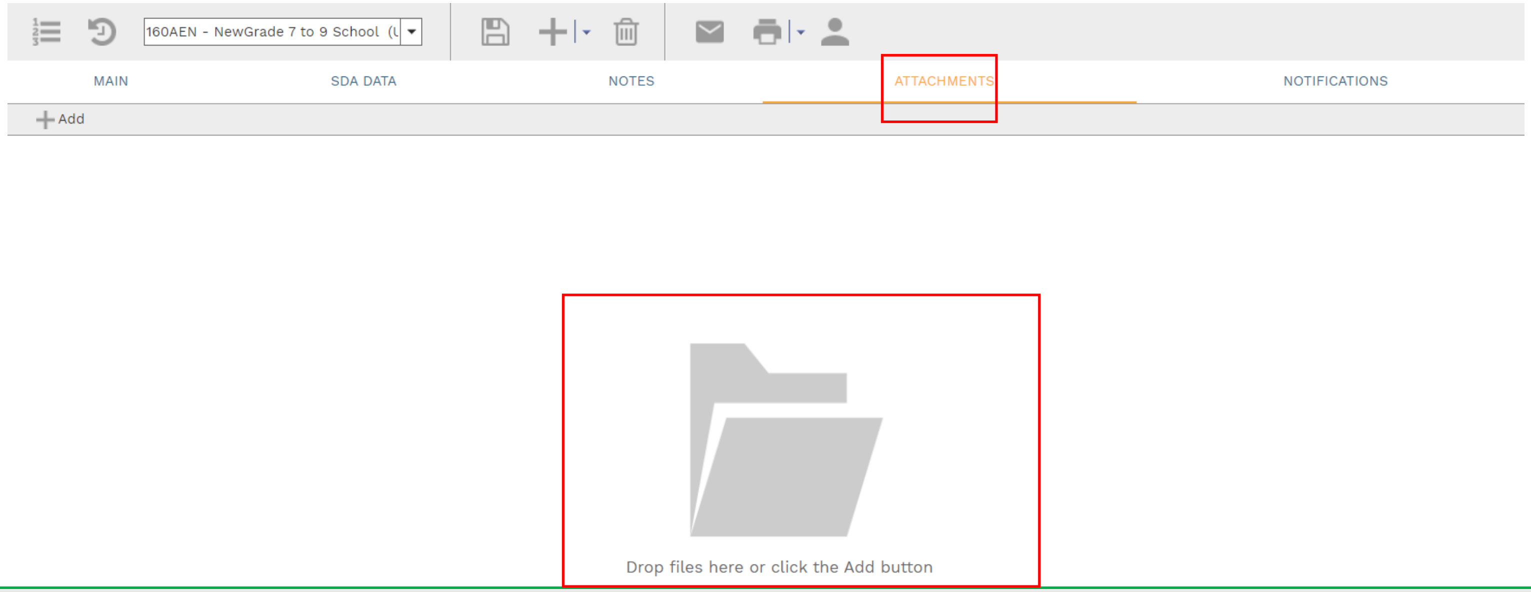
ADD ADDITIONAL NOTES

- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.

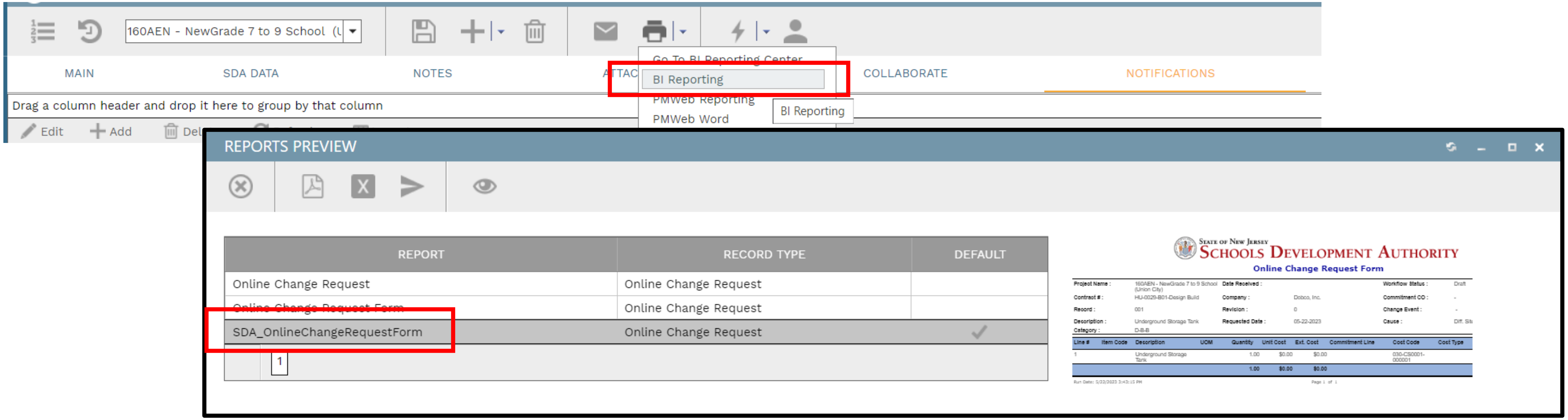


ADD ATTACHMENTS

- Drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



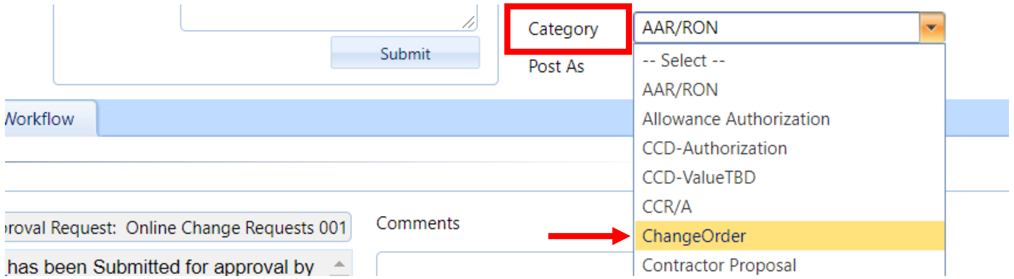
- Additionally, a report should be printed for each phase of Change Management. Click the **printer icon** in the header section and select **BI Reporting**.



Select **SDA_Online Change Request Form**, then select **Print to PDF**. Save this report in a desired location. Return to the Attachments tab and add this report to your list of attachments.

CREATING A FINAL CHANGE ORDER

- When all preliminary phases of Change Management are complete, a final Change Order can be created. Change the **Category** field in the Header section to **Change Order**. Click the **Save** button to continue.



- Click the **Workflow** tab and click the **Submit** button. This document will be reviewed for correctness prior to the creation of the Change Order. Those parties involved in the workflow review are established on a project-by-project basis. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval. After document receives final approval, it will be submitted for processing by the SDA's Central Processing Unit team.